



Online Training Booking in Social Care

For anyone Supporting Adults in Cornwall

User guide



Foreword

Please note this user guide is divided into:

- Managers of the Private, Independent & Voluntary Organisations and the Health Sector - who have been granted 'Supervisor Access' - to allow them to book their teams training
- Adult Care & Support User Guide:
 - Self Server Access Staff with no Line Management responsibilities - able to take responsibility of their own training although will require line management authorisation
 - Supervisor Access Line Managers who can authorise their team members training and to book their own and team members training.

The rest of the User Guide is applicable to all so please see the contents page

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Accessing the Training Online Booking System

• Click on the link https://db.cornwall.gov.uk/sdms

Now either Browse, Register for a Login or Login

Browse

 Allows you to browse courses without logging into the online system (please see pages below for how to navigate the system)

Register

Only Applicable to Private, Independent & Voluntary Organisations and Health Sector

- If the training authoriser within your organisation has not received an email from Adult Care & Support, Learning, Training & Development Unit containing login details for the Online training Booking system they must:
 - Click Register
 - Complete form All items marked with an asterix are mandatory -click Submit Registration
 - Once the Learning, Training & Development have received this request - login details will be sent via the specified email address

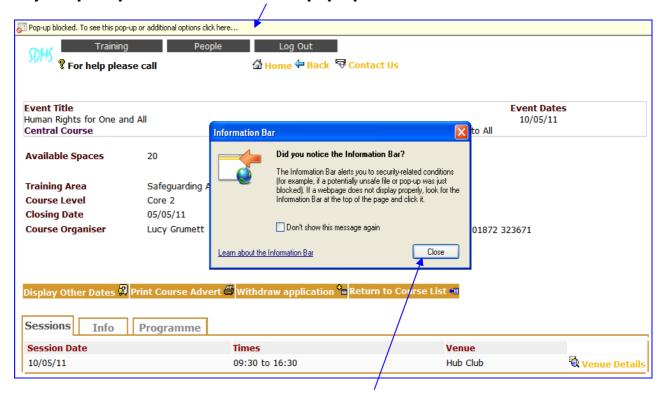
Logging in

When you have received an email with your login details

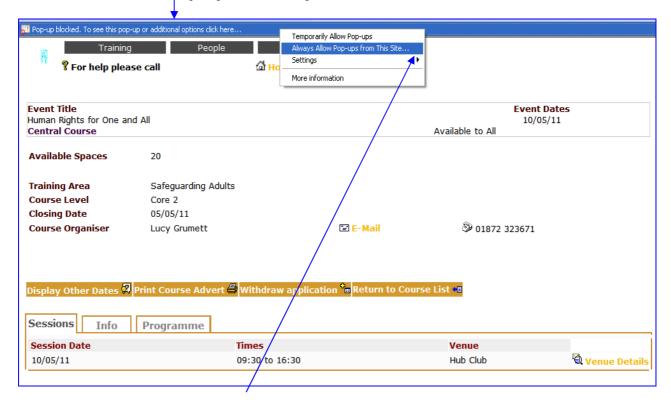
- Click on **Log in** and enter your **Username** and **Password** into the relevant fields Click on the **Login** button
- This navigates you to the course booking page

IMPORTANT

Please be aware the first time you use this system to enrol someone/yourself on a course or approve an application—it will say "Pop—up blocked. To see this pop up click here":



- Click Close on the Information bar box
- Click on the Pop Up box at top of screen



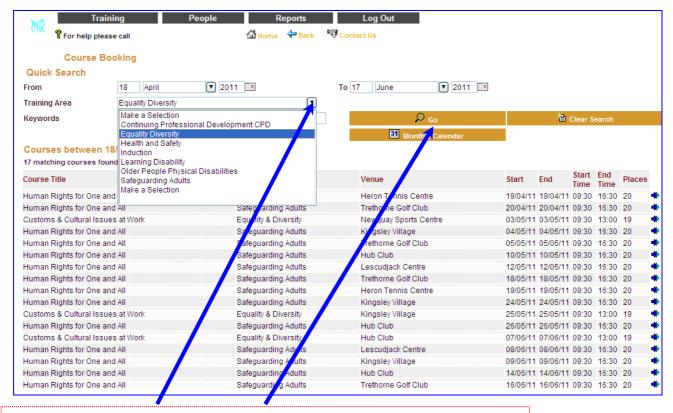
Click Always Allow Pop-ups from this site

Please be aware that anything that you would have done will not be saved and you will need to do this again, but from now on you will be able to use the system as normal.

Search for Courses:

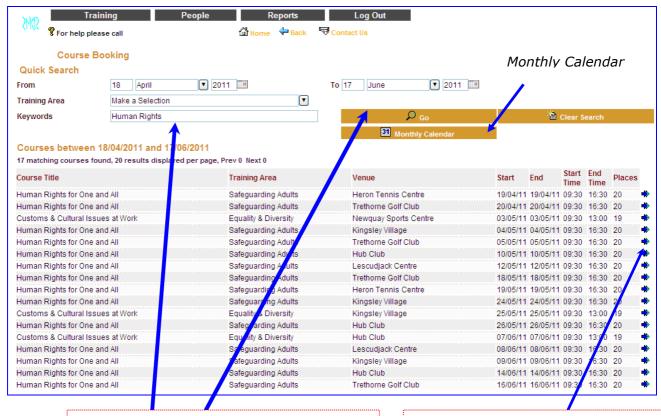
You can search for Training courses by Training Area, Keywords & by a Monthly Calendar. Once logged in you will see the screen below:

By Training Area



Click on arrow at end of training area and select relevant area. Then click Go

By Keywords



Type keywords i.e. Course title. Click Go

Click on Further Details Blue arrow of training session

Monthly Calendar

To view a monthly Calendar - Click on **Monthly Calendar** button. This displays the screen below where you can browse all training by month.



Course Booking Page Explained



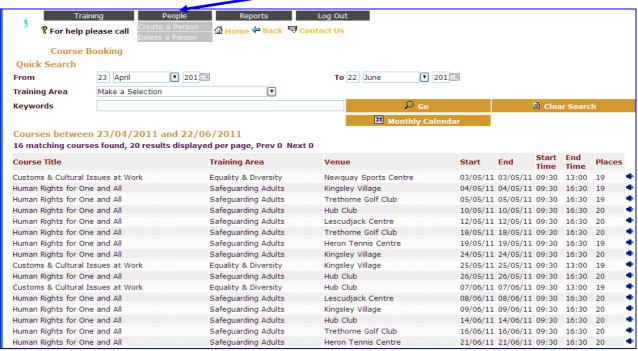
- Shows course Title (1)
- Training Area (2)
- Venue for Session (3)
- Start Date & End Date of Training Session (4)
- Start & End Time of Training Session (5)
- Places available on Course Enrolment limits can apply which is explained when looking further (6)

Private, Independent & Voluntary Organisations

&

Health Sector

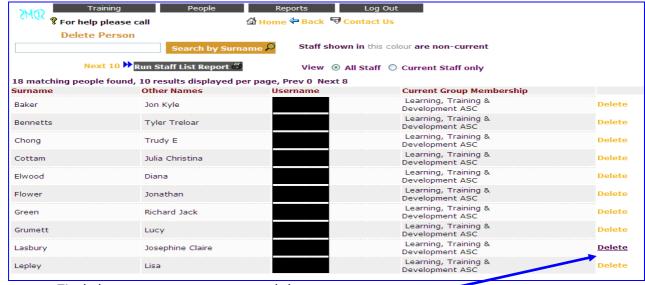
Online Training Booking System User guide



- Click on People Tab
- Select Create a Person
- Fill in the mandatory details
 - Username I.e. Staff reference number/pay number something unique to that person. Please type a prefix to the username i.e. first 3 letters of your organisation. This avoids duplication on the system
 - Surname
 - Other Names First Name
 - Title Mr, Ms, Miss, Mrs etc
- A message will then appear saying 'Details have been confirmed return to Update Staff list' – OK to add more staff members or Cancel.

Delete a Person from your Team

- Click on **People Tab** as above
- Select Delete a Person

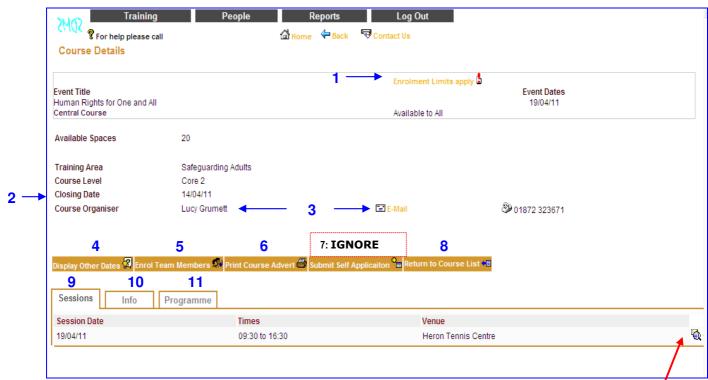


- Find the person you want to delete
- Click delete link to the right of their name
- A window will ask: Are sure you want to delete. Click Continue

Further Details of Training Course/Session

Once you have found a course that suits you/your team members - click on the **further details blue arrow** (See Page 5).

The blue arrow directs to the Further Details of Training Course screen

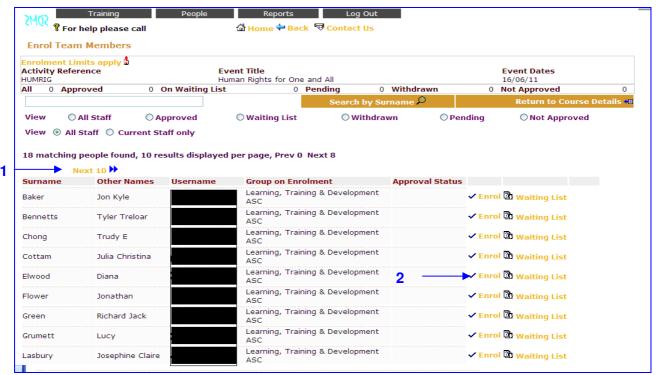


This page is specific to a single course date and it shows:

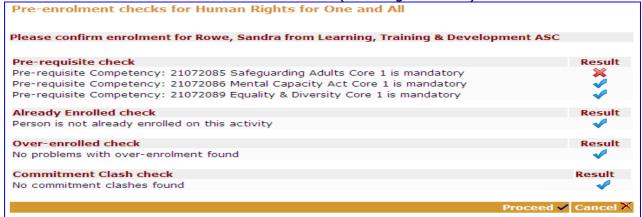
- 1. Enrolment Limits Shows how many people per organisation can apply for this course
- 2. Closing date for applications
- 3. Contact person for queries about this course with email address & phone number
- 4. Display other dates for the course
- 5. Enrol a member of your team on this course on this date
- 6. Print Course details to advertise on notice boards
- 7. IGNORE THIS BUTTON THIS IS FOR INTERNAL ADULT CARE & SUPPORT STAFF
- 8. Return to original course booking page view other courses
- SESSIONS TAB Session date, Time & Venue with further venue details (Address & Map via Multimap - can be printed)
- 10.INFO TAB Information relevant to the course
- 11.PROGRAMME TAB Course Programme, Aims & Objectives

Booking a Course

Once you have chosen a course with a suitable date and venue you can enrol yourself or any of your team on the course. Click **Enrol Team Members** Button (5). This shows the page below:



- Find the relevant person (in alphabetical order)- click next 10 (1) if they aren't on this page
- Click **enrol button** (2) to book a place for that person
- The pre-enrolment checks screen will be displayed which shows:
 - Pre-requisite training must be completed before attending the course. (If you have a certificate of completion please forward to LTDU, Old County Hall, Truro, TR1 3AY to update our records). If they need to complete – please contact the course organiser.
 - Already enrolled check-shows if person is enrolled on this course on a different date – if please either cancel this date or withdraw or replace with another team member on other date (See Pages 18-19)
 - Over Enrolled check shows available spaces to your organisation



Click **Proceed button** to complete enrolment.

A dialogue box will tell you if a place has been booked or if on a waiting list. An email will be sent to your specified email address confirming course details – **please pass these to the team member.**



Enrolment Confirmation Message for Human Rights for One and All

Lasbury, Josephine Claire from Learning, Training & Development ASC

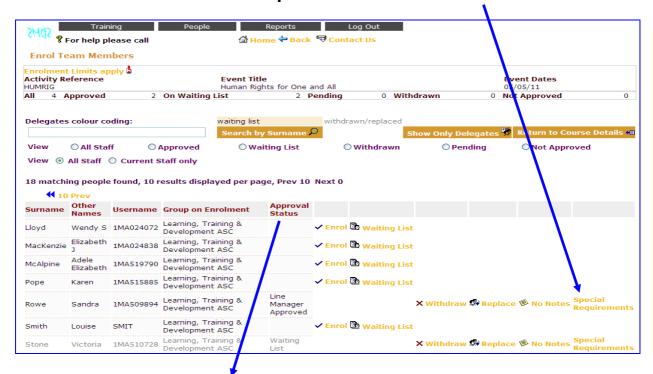
Because there are no available spaces on this course this application is placed on a waiting list.

<u>If on waiting list</u> – You could be contacted at short notice about your availability. If however you don't want to be held on the waiting list please withdraw your application (See page 18-19).

Click **OK** to close this window – it will then direct you back to your Enrol Team Members screen.

Special Requirements

If the person enrolled has any special requirements for the course please click on **Special Requirements link** to the right of their name and follow the on-screen instructions – click **Update** then close the window.



Highlights the status of the application

- Line Manager Approved means a place has been successfully allocated.
- Waiting List Person has been placed on a waiting list

Adult Care & Support Staff

Online Training Booking System User guide

Self Server Access People with no Line Management Responsibilities

Enrol Yourself on a Course

Once you have found a course and venue that is suitable-click on the **further details blue arrow** (See Page 5).

The blue arrow directs to the Further Details Training Course screen below:



This page is specific to a single course date and it shows:

- 1. Enrolment Limits Shows how many people per organisation can apply for this course
- 2. Closing date for applications
- 3. Contact person for queries about this course with email address & phone number
- 4. Display other dates for the course
- 5. Print Course details to advertise on notice boards
- 6. Enrol yourself on a course this then emails your line manager for their approval
- 7. Return to original course booking page view other courses
- 8. SESSIONS TAB Session date, Time & Venue with further venue details (Address & Map via Multimap can be printed)
- 9. INFO TAB Information relevant to the course
- 10.PROGRAMME TAB Course Programme, Aims & Objectives

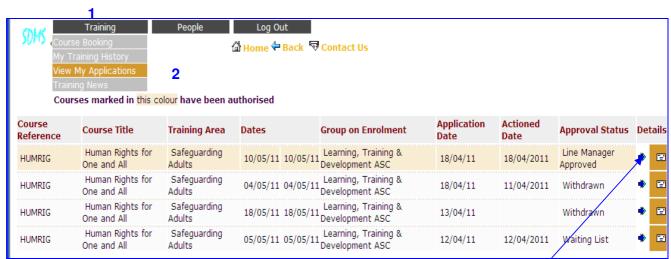
To enrol yourself on the course -

- Click **Enrol Yourself** (6)
- A dialogue box will flag up asking you if you have any special requirements, If Yes click OK – and follow on screen instructions
- You will receive an email telling you your application is pending approval from your line manger
- An email will be sent to your line manager to ask them to authorise your training place
- When authorised you and your line manager will receive a confirmation email of your training place detailing all course information including any pre-requisite work.

Withdraw your Application

If at a later date you are unable to attend the course please withdraw your application so that the place can be assigned to someone else. It is the policy of the Learning, Training & Development Unit to charge for non-attendance

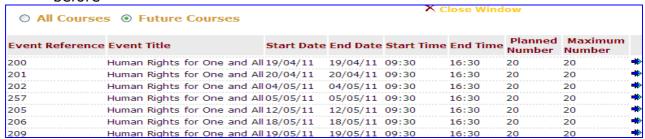
- Click **Training Tab** (1)
- Click View my Applications (2)



Find the course application that you would like to withdraw and click on the **further details blue arrow**



- Click withdraw application (3)
- It will ask you to confirm. Click ok
- You & your line manager will then receive an email detailing your withdrawal from the course
- If you would then like to enrol on another date, click Display other dates. Click on further details blue arrow and enrol as before



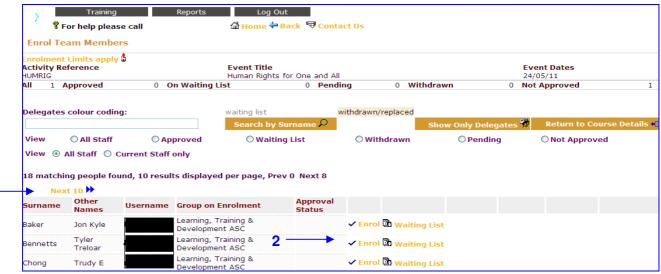
Line Managers

Enrol Yourself on a Course

As Self Server Access (Page 13)

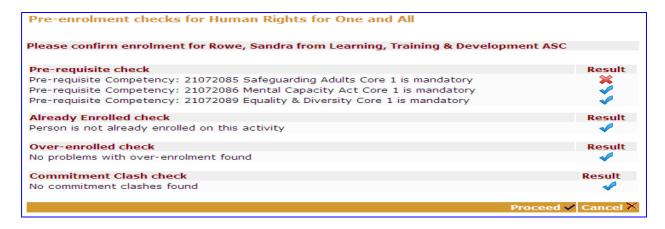
Booking a Team member on a Course – Relevant to managers responsible for booking training for those who don't have email accounts

Once you have chosen a course with a suitable date and venue you can enrol any of your team on the course. **Click Enrol Team Members Button** (5). This shows the page below:



- Find the relevant person(in alphabetical order)-click next 10 (1) if they aren't on this page
 - Click enrol button (2) to book a place for that person
 - The pre-enrolment checks screen will be displayed which shows:
 - Pre-requisite training which **must** be completed before attending the course. (If you have a certificate of completion please forward to LTDU, Old County Hall, Truro, TR1 3AY to update our records). If they need to complete – please contact the course organiser.

 - Over Enrolled check shows if there are available spaces to your organisation
 - Commitment Clash Check Shows if the person is booked on another course on this time and date - if please ensure you either cancel this date – or withdraw or replace with another team member (see pages 18-19)



Click Proceed button to complete enrolment.

A dialogue box will tell you if a place has been booked or has been put on a waiting list. Along with an email sent to your specified email address confirming course details – **please pass these to the team member.**



Or



<u>If on waiting list</u> – You could be contacted at short notice about your availability. If however you don't want to be held on the waiting list please withdraw your application. (see pages 18-19)

Click OK to close this window – it will then direct you back to your Enrol Team Members screen.

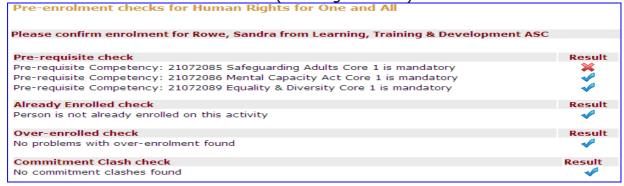
Authorising a Team Members Training Application

When a member of your team books themselves on a training course an email is sent to you to authorise their training place. To do this:

- Log in to Website: https://db.cornwall.gov.uk/sdms
- Click on Training Tab
- Select View applications



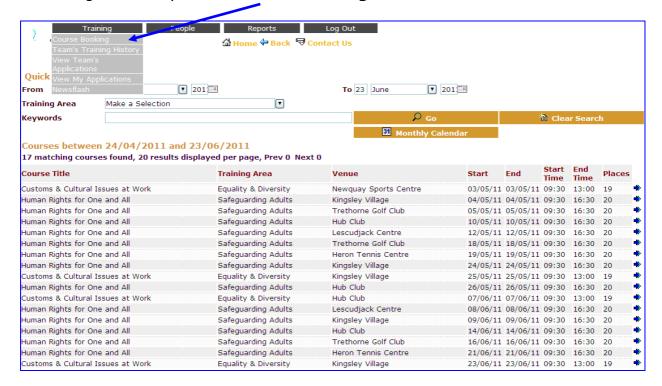
- · Select applicant for authorisation
- This then highlights the application details (1) i.e. the course and date they have applied for
- Click on Pre-enrolment checks (2) which shows:
 - Pre-requisite training which **must** be completed before attending the course. (If you have a certificate of completion please forward to LTDU, Old County Hall, Truro, TR1 3AY to update our records). If they need to complete – please contact the course organiser.
 - Already enrolled check shows if the person is enrolled on this course on a different date – if please either cancel this date – or withdraw or replace with another team member (See Pages 18-19)
 - Over Enrolled check shows if there are available spaces to your organisation
 - Commitment Clash Check Shows if the person is booked on another course on this time and date - if please ensure you either cancel this date – or withdraw or replace with another team member (See Pages 18-19)



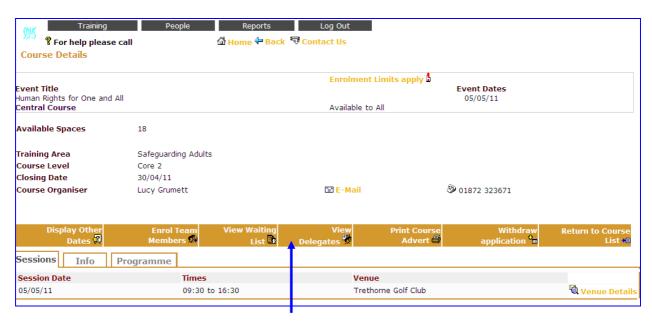
- Close the window
- Click Approval button (3) to authorise or Not approved button (4)
- A confirmation email will be sent to yourself and the team member with the course details and any pre-requisite work

Replacing a Delegate on a course with another Team Member

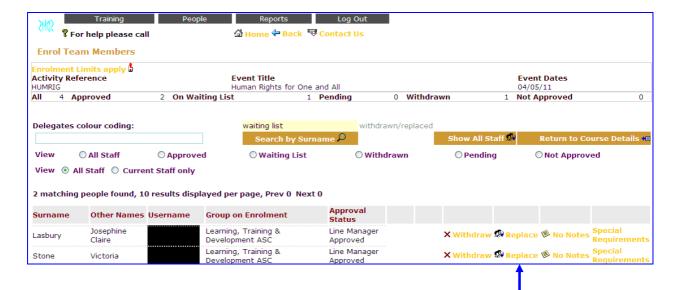
Login to the system. Click on Training Tab



- Click on Course Booking
- Find the course that the person is booked on Click the further details blue arrow – displays the page below



Click the View Delegates button



 Click the replace link to the right of the person you want to replace



- Click the List link to pick the employee you want to attend instead
- Click OK to confirm OR Cancel
- The pre-enrolment check screen will appear ensure this is correct and click proceed
- Click F5 on your keyboard to refresh the system to update these changes
- Complete any special requirements for this person by Clicking Special Requirements Button to the right of their name and following on-screen instructions
- An email will then be sent confirming the place and the course details

Withdraw an Application

It is the policy of the Learning, Training & Development Unit to charge for non-attendance. Therefore please withdraw an application if the place is no longer needed. As per replace delegate (above) but click the Withdraw button to the right of their name. You will receive an email saying the person has been withdrawn from the course.

Training Records

The system is set so that Self Serve Access (ACS staff) can view their own training records.

Line Managers within ACS and the Private, Independent & Voluntary Organisations and Health Sector can view their teams training records.

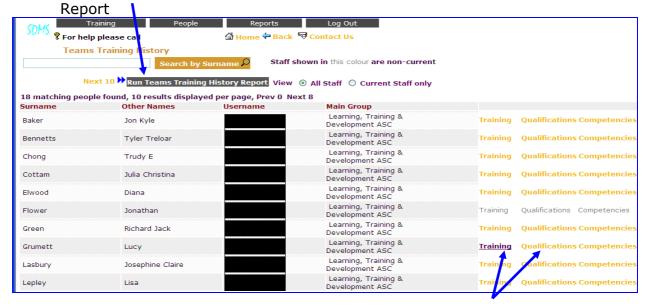
If these training records are incomplete, please send copies of the certificates to ACS Learning, Training & Development Unit, Old County Hall, Truro, TR1 3AY so that we can update this.

Line Managers within ACS & Private, Independent & Voluntary Organisations & Health Sector - To view Team Members and Your own Training Records

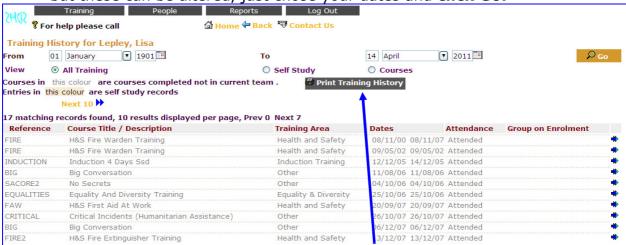
Click on Training Tab and click Team's Training History



This displays your team members including yourself. You can run the whole teams training history – to find who did what training and when within a given time period – click Run Teams Training History



 Click the Training or Qualification link to the right of the persons name The From and To date is defaulted to 1901 to the present date – but these can be altered, just chose your dates and click Go.



- Above is the training history which can be printed by clicking the Print Training History button
- Click Next 10 to see more training if there is some.
- This can be repeated for the persons qualification record.

Self Serve Access (for all ACS staff) – To View your Training & Qualification Record

Click Training Tab & Click My Training History △ Home ← Back ▼ Contact Us Programme For help please call Training History for Stone, Victoria 01 January 1901 19 April 2011 View O Self Study All Training O Courses Courses in this colour are courses completed not in current team. Print Training History Entries in this colour are self study records 7 matching records found, 10 results displayed per page, Prev 0 Next 0 Reference Course Title / Description Training Area Dates Attendance Group on Enrolment ELEARNSA Safeguarding Adults Core Part 1 E-learning Safeguarding 25/07/10 25/07/10 Attended ELEARNE&D Equality & Diversity Part 1 E-learning 28/07/10 28/07/10 Attended ELEARNMCA Mental Capacity Act Induction E-learning Other 30/07/10 30/07/10 Attended ELEARNDEM Dementia E-learning Other 01/08/10 01/08/10 Attended Other **ELEARNSDS** Self Directed Support E-learning 29/08/10 29/08/10 Attended ELEARNSCH Safeguarding Children For Those Working With Adults E-Learning Other 30/08/10 30/08/10 Attended Induction GENERAL 30/09/10 30/09/10 Attended

- You can define your search by date by altering the From and To Date (1 & 2) and clicking the Go button (3)
- Print your training history Click Print Training History button
 (4)

To view your qualifications:

Click on the People Tab (1) & Click My qualifications (2)

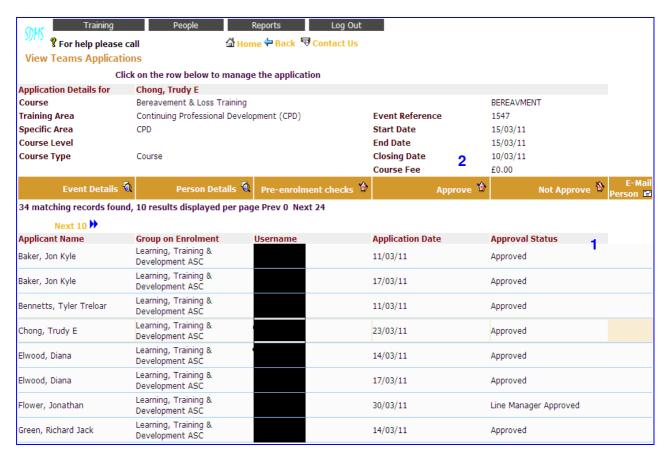


- This screen shows the qualifications that you hold, when it was awarded, and if there is an expiry date – so that you can keep on top of whether a qualification is running out.
- Print qualification record Click Print Qualification Summary (3)

Line Managers or Training Authorisers View All Team or My Applications

This allows you to keep track of all applications that have been submitted, just a quick way to see the status of the applications i.e. have you approved and who is doing what and when.

Click on training Tab – Click View Teams Applications



Click on the person to see what course they are applied for (top of page), Look at Approval Status (1) - if application requires approving Click Approve Button (2)

View My Applications - Self Serve Access (ACS Staff)

- Click on Training Tab
- Click View my Applications you can see all applications and their Approval status i.e. Withdrawn, Waiting List, Approved, Not Approved – Click Further Details Blue Arrow to see further details of the course



Newsflash - On Training Tab

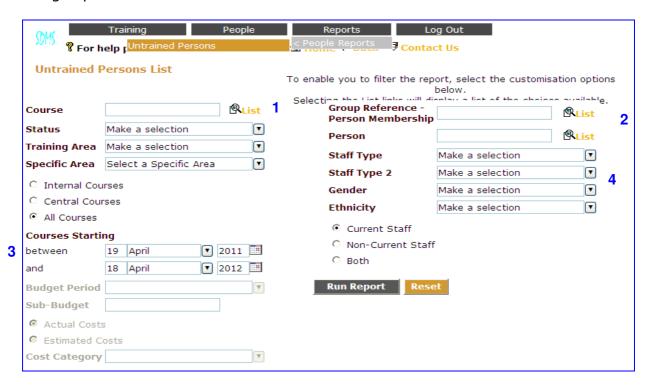
Keeps you updates on any learning & development opportunities new to the Online Training Booking System

Untrained Person Report

For Line Managers and Training Authorisers – this function enables you to highlight which team members have not completed a certain training course.

- Click Reports
- Click People Reports
- Click Untrained Persons

Brings up the screen below:



- Pick a course by Clicking on the List Link (1) and Pick your Group on the Group Reference List Link – automatically defaults to your group (2)
- Click Run Report
- You can change the Courses between dates (3)

This should then bring up a report a people not holding this training.

Please ignore any of the following filters

Staff Type, Staff Type 2, Gender, Ethnicity (4). Due to the nature of how SDMS is used the information held against this is not complete and the system is set to display these filters and cannot be removed.

Contact the Learning, Training & Development Unit



- Click on Log Out tab
- Click Contact Us
- Comes up with our Address, Telephone Number, Fax Number and Click on the email link to email us

Change Password

- Click on the Log Out tab
- Click Change Password
- Type in your new password
- Click Update